The Naked Truth: The State of Evaluation in Alberta

PROCEEDING REPORT (April 10, 2015)

#Evaluation is fun
Do you use evaluation? Need help making decisions? Contact your local evaluator. Better evidence = better decisions. #Eval. Data without context is not evidence. Evaluation. Budget getting cut? Contact #abeval @ ab.evaluationcanada.ca Evaluate today — transform tomorrow!


ACKNOWLEDGEMENTS

Thank you to the local CES chapter and the following partner representatives for organizing and hosting the forum:

Shelby Corley (CES AB/ NWT Chapter)
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Kathryn Graham (CES AB/ NWT Chapter & AIHS)
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Brenda Simpson
Kelly Tyler (Government of Alberta, Evaluation and Assessment Network (EAN))
Tracy With

And many thanks to Lee Elliott for compiling this proceedings report. It will help us advocate for the profession, communicate the value of evaluation, and identify the most promising path for the profession’s advancement.

This Proceedings Report is intended to be a living document – questions and comments are welcomed – contact us at pme@aihealthsolutions.ca and cesab-info@evaluationcanada.ca, with your feedback and/or to learn more about the forum and the activity it sparked.

Interested in being involved in future evaluation capacity and/or evaluation advocacy efforts of the local CES chapter (cesab-info@evaluationcanada.ca)? Its partner, AIHS (pme@aihealthsolutions.ca)? Or its affiliates, e.g., local evaluation networks? Let us know.

Evaluate today—transform tomorrow!

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FORWARD

Tracy With  
*Immediate Past President*  
*Canadian Evaluation Society Alberta & NWT*

The strength of Alberta’s professional evaluation community is clear. This one-day forum showed that Alberta is a powerhouse of talent with strong networks of professional evaluators within our partner organization Alberta Innovates – Health Solutions, within Canada’s largest single healthcare provider (AHS), within the Government of Alberta, as well as within municipal governments, private practice and our universities. This provincial network owes much of its strength to the power of our national Canadian Evaluation Society.

As I pass the CES Alberta & NWT president’s torch to Patricia Paton, I know the energy of the forum and the evidence of our phase 1 environmental scan will support her in leading the way to a bright evaluation future for our province.

Rebecca Mellett  
*Executive Director*  
*Canadian Evaluation Society*

It was a privilege for me to begin my service as executive director by joining the professional evaluation community of Alberta & NWT for this one-day forum.

Days like these, where the knowledge exchange is palpable, have made Canada the world leader in evaluation. Countries like the United States, Taiwan, Japan and others have followed our lead in establishing professional evaluation societies and are learning from us as they develop credentialing for their practitioners.

Congratulations, Alberta. I look forward to our collaborations as well as the opportunity to learn from you, and to support you in turn with the resources of our national organization.

Pam Valentine  
*Chief Executive Officer (Interim)*  
*Alberta Innovates - Health Solutions*

Alberta Innovates Health Solutions is pleased to have partnered with the Canadian Evaluation Society and its Alberta & NWT Chapter in presenting The Naked Truth: The State of Evaluation in Alberta.

At AIHS, we know the discipline of evaluation is critical to ensuring we are a learning organization and that our efforts and our investments achieve our aims. I know that evaluation can support all businesses, governments and public programs in better informing decisions and optimizing the impact of investments.

Congratulations on a successful forum and your work to build the networks and collaborations critical to strengthening this powerful professional practice.

*Mobilize intelligence for improvement and innovation #Eval*
EXECUTIVE SUMMARY

Our “Glocal” Enterprise:
To boldly go where no one has gone before

Like the voyages of the starship enterprise, the Canadian Evaluation Society is charting new territory. It is leading the world in setting the standards for professional evaluation practice, in facilitating professional development, and in establishing credentialing for practitioners. The world is watching Canada.

At the same time, Alberta, through the CES Alberta & Northwest Territories Chapter, and partners like Alberta Innovates-Health Solutions (AIHS), the Government of Alberta and Campus Alberta (research and innovation), is proving to be in the vanguard when it comes to advancing a discipline that can be transformational for organizations.

To use a term offered by Dr. Kathryn Graham, advocate for the local CES chapter and executive director of Performance Management & Evaluation for AIHS, this meeting of minds and expertise is a “glocal” enterprise: building on a global perspective to meet local needs.

Alberta’s one-day forum, the Naked Truth, was held April 10, 2015, in Edmonton to advocate for the evaluation profession in the province. The forum saw attendees from across Alberta connect, learn and advocate for a stronger profession.

The focus on advocacy was one of the key drivers for the event, says Graham. “Evaluation evidence can better inform decisions and ultimately contribute to better outcomes for Alberta,” she says. “But realizing this benefit requires shared understanding of the value proposition on the part of evaluators, policy makers and decision makers, forums such as this will be essential to ensuring a strong advocacy story for all stakeholders,” she says. The purpose of the event was to network, exchange knowledge and inform advocacy plans for the local chapter. To this end, attendees networked, were presented information about the current state of evaluation capacity in the local chapter, and learned about resources available through various evaluation networks.

Attendees engaged in small group discussions to explore the strengths, weakness, threats and opportunities facing the profession locally. They also participated in facilitated exercises to generate potential advocacy messages in the form of mantras, tweets and value propositions. Below is just one great example of an evaluation mantra from the day and others are provided throughout this report:

*Evaluate today—transform tomorrow!*

If a common theme emerged from the event, it was that delegates wanted more: More chances to connect, to learn, and to work together to advance the profession.

Delegates indicated interest in sustaining engagement and building upon the learning and momentum generated at the forum to advance the profession and its advocacy effort. The energy, learnings and connections forged from the day will be used to help chart the future for the evaluation enterprise in the local chapter and perhaps beyond.
WHO ATTENDED?

69 Attendee Profile
84% Evaluators
56% CES members
32% Researchers
16% Program managers
8% Policy or Decision makers

24 of 69 (35%) responded to a post-forum survey

100% Satisfied with the opportunity to learn, share and network
96% Overall satisfaction
96% Recommend event
88% Made new or renewed contacts
76% Increased awareness of evaluation capacity
36% Increased knowledge of accessible resources

EVENT OBJECTIVES

NETWORK
To connect evaluators and evaluation users across the Alberta & Northwest Territories chapter

KNOWLEDGE EXCHANGE
To learn about and share information regarding current capacity for evaluation in our Chapter

ADVOCACY
To identify opportunities to advocate for evaluation in our chapter

DELIVERABLES

• New knowledge through presentations
• Video presentations for review
• Tweets, mantras and value propositions
• List of network contacts
• Access to the technical report for the environmental scan Phase 1 results
• Enhance Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis of the state of evaluation in Alberta
• Proceedings report
PREVIOUSLY ON THE “GLOCAL” ENTERPRISE

1980  The Canadian Evaluation Society (CES) becomes one of the world’s first formal organizations for the promotion of the discipline of professional evaluation. There are now 222 voluntary organizations for professional evaluation worldwide.

1984  Alberta & NWT chapter of CES is established.

2009  CES becomes the first evaluation society in the world to create a professional designation credentialing program, setting a standard for other countries exploring professionalization.

Few people are better able to describe the landscape of evaluation in Canada than Benoit Gauthier, CES president. He has been involved in program evaluation for 30 years, first with the federal government and then as a private practitioner and has earned the CES award for contribution and service.

“In 2003 I asked 12 evaluators from across Canada to each identify one strength and one weakness in evaluation practice in their chapter, as well as one opportunity and one threat,” says Gauthier. “I asked the same questions in 2009.”

The first time he asked the questions, evaluation was positioned as an empirical research program and most often used for policy assessment, says Gauthier. “But it was said to lack an identity of its own.” Program monitoring was the dominant activity, and there was insufficient connection to management needs. “The need for self-definition as evaluators was seen as paramount,” he says. “Recipes for success were advocacy, teaching and recruitment, knowledge development, professional development, leadership, networking and self evaluation.”

Six years later in 2009, “professional designation was about to become a reality and organizations were more focused on results. Advanced education and professional development for evaluators were still limited, evaluation approaches were rigid, and we did not self assess our practice,” he says.

At that time, says Gauthier, demand for evaluation and evaluators was on the rise, but the supply of professional evaluators and financial resources to conduct evaluations were lacking.

When Gauthier highlighted the present, which includes credentialing and hiring a full-time Executive Director for CES, it’s clear that momentum for the profession is accelerating.
NATIONAL EVALUATION CAPACITY ANALYSES

2004/5  Coryn: The State of Evaluation in Canada
2006    Gauthier et al.: Evaluation practice in Canada: results of a national survey, 
         Canadian Journal of Program Evaluation, vol. 21, no. 3, special issue 2006, 
         pp. 1-42
2010    Gauthier: With a Little Help from our Friends: A Study of Evaluators’ Networks
2013/14 Gauthier et al.: CES National Survey on Professional Development
2015    Gauthier et al.: The CES Professional Designations Program: Views from CES members

PROVINCIAL EVALUATION CAPACITY ANALYSES

2013    Gokiert: Project Proposal for Community/University Partnerships (CUP) 
         and Creation of the Evaluation Capacity Network (ECN) for Early Childhood 
         Development Programs
2014    Crystal Corrigan: An Environmental Scan of Evaluation Capacity in Alberta 
         (Phase 1)

A CLOSER LOOK AT REAL TIME

TODAY

• The Canadian Evaluation Society (CES) is a 1,600-member strong global force and an international leader in credentialing, professional development, networking, mentoring and knowledge exchange

NATIONAL VIEW

Provided by Benoît Gauthier

• Greater appetite for evaluation evidence
• Expanded use of evidence across government, foundation and not-for-profit sectors
• Less rigid, more innovative evaluations being performed
• Clearer definition of the profession, including credentialing
• Professionalization of the national organization

Benoît Gauthier says his national and international discussions lead him to believe there is more appetite than ever for evaluation evidence. “Users want results from evaluation,” he says, “and don’t care much about the process.”

Gauthier says those using evaluation have also expanded to include all levels of government, foundations and not-for-profits. “There is still a lot of potential for provincial governments, municipal governments and for-profits that want to think beyond the bottom line,” he says.

He also sees more interesting evaluations being performed, less rigid use of logic models, and less use of the “measure everything” approach. He sees more use of program theories, contribution analyses, and mixed-mode designs. “Systems thinking is still at its early age, but so are several other schools of evaluation.”

“I think we have collectively achieved a good level of self definition,” says Gauthier. “We know who we are as evaluators.” Much of this can be attributed to the growth in graduate programs, the CES credentialing program, and professional development provided by CES, which now aims to offer more intermediate level courses.

While a committed volunteer effort got CES to where it is today, says Gauthier, “CES is itself on the path of professionalization with the appointment of its first executive director.”

PROVINCIAL VIEW

Provided by Crystal Corrigan

• All organizations interviewed say they engage in evaluation, but just half have dedicated evaluation staff
• The organizations interviewed use evaluation primarily for accountability and analysis and learning
• The organizations interviewed saw growth in evaluation practice as both a challenge and an opportunity
• Interviewees identified the need for growth on two fronts:
  ◦ More, and more highly trained, evaluation staff
  ◦ More exemplary organizational leaders who will drive growth of environments that support evaluation

Want to bring excellence into practice. Call an evaluator to do more with less. #abeval
PERCEPTIONS OF THOSE WHO USE EVALUATION

BACKGROUND: Crystal Corrigan was project lead for the preliminary and Phase 1 work of an evaluation scan undertaken by the CES Alberta and Northwest Territories (NWT) Chapter in partnership with Alberta Innovates – Health Solutions. When the four-phase scan is complete, it will provide a high-level understanding of the needs of evaluators, funders, and decision-makers as well as greater understanding of the evaluation capacity of individuals, organizations and systems in Alberta.

WHAT CAN’T THIS WOMAN DO?

Crystal Corrigan is a registered dietitian recently completed a Health Research and Evaluation internship with AIHS. As a registered dietitian and regional manager, she oversees 100-clinical and non-clinical employees in a 153-bed and 258-bed assisted living facilities. She's also pursuing a Master’s of Public Health degree at the University of Waterloo and aims to become a credentialed evaluator. The day of the forum, she wrote an exam at 6 am, finalized her report on the environmental scan, and delivered her findings.

Two weeks later, she gave birth to a beautiful baby boy named Archer Augustus Corrigan.

Most recently she has been offered an evaluation opportunity with the Public Health Agency of Canada in partnership with the PROPEL Centre for Population Health Impact at the University of Waterloo to examine the unintended consequences (both positive and negative) associated with the multi-sectoral approach.

PRELIMINARY PHASE

Corrigan engaged stakeholders in identifying priorities for the environmental scan, refining evaluation questions and the scan’s design and methodology.

PHASE 1

Corrigan looked at those who commission, fund or use evaluation results in decision making at the organizational level. She conducted 15 semi-structured interviews with informants in government, public and private industry to identify the strengths, weaknesses, opportunities, and threats (SWOT) for evaluation in Alberta’s health, research and innovation sectors.

Why evaluation matters

Those interviewed also saw a need for increased professional development for evaluation staff, including some specialized training to align with distinctive organizational needs.

“The majority of those interviewed also indicated that the current level of dissatisfaction with the products of evaluation, both internally and externally, was related to poorly defined evaluation project expectations,” says Corrigan, “and role clarity of both the organizational manager and/or evaluator.”

Corrigan grouped responses to questions of how organizations were using evaluation with Rand Europe’s four A’s: Accountability, Analysis and learning, Allocation and Advocacy and found that “the organizations represented undertake evaluations primarily for accountability and analysis and learning.” To a lesser degree, they engaged in evaluation for allocation and advocacy, she says.

All organizations identified the ability to adopt systematic, comprehensive evaluation into practice as both a challenge and an opportunity. “This transformation requires a culture shift with accompanying increases in evaluation literacy and tie-ins with organizational decision-making and recognition of the learning benefits [that can result when evaluation practice is more strategically aligned with organization needs],” says Corrigan.

“Although all organizations reported doing evaluation work,” says Corrigan, “only 50 per cent have a dedicated evaluation unit or staff.” It’s no surprise then that respondents identified staffing levels as a gap to be addressed.

### Why organizations are using evaluation

- **Accountability**: to show that money and other resources have been used efficiently and effectively and to hold [an entity] to account.
- **Analysis and Learning**: to show what is most effective in terms of different outputs and outcomes, including the impact of research.
- **Allocation**: to feed evidence into decision-making on where to most effectively invest human and financial resources.
- **Advocacy**: to demonstrate the benefits of supporting evaluation and enhance understanding of evaluation and its processes among policy makers and the public.

(Adapted from RAND Europe, Developing a research evaluation framework, 2013)
DEFINITIONS FOR THE PURPOSES OF THE ENVIRONMENTAL SCAN

**Evaluation** is the systematic and objective assessment of an entity (e.g. project, program or policy) to determine the state of affairs, value, merit, worth, and/or significance of the entity.

It is a process often undertaken selectively to answer specific questions to guide/inform decision makers and/or program managers and provide information on what worked, what didn’t work (for whom in what context) and why.

**Capacity** is considered at three levels:
- The enabling environment (culture, networks and resources)
- The organizational level (policies)
- The individual level (skills)

*(Fowler et al., 1995; OECD, 2004; UNDP, 2009)*

**Maturity**

1. Organizations at the first level of maturity “include the conscious use of skilled evaluation, typically in the form of quality assurance methods or performance measurement systems.”

2. Organizations at the second level of maturity, “supplement the organization’s internal evaluation efforts with external evaluators or auditors, providing an independent view.”

3. “The third level of maturity is achieved with the internalization of the evaluative attitude throughout the organization as demonstrated by the organization’s structure, policies, rewards and actions.”

*(Gauthier et al., 2010)*

**An exemplary leader**

“An individual with a strong evaluation and management background, who reconciles expectations of senior management with operational requirements and resources and teams, who guides, mentors, and coaches team members as part of his or her regular activities.”

*(Bourgois and Cousins, 2013)*
ALBERTA’S EVALUATION CAPACITY

Strengths: What’s working?

Note: The findings below reflect the preliminary results of the phase 1 environmental scan and feedback solicited from forum participants. The intention is that the SWOT results will be a ‘living document’, updated with knowledge generated through subsequent phases of the environmental scan on evaluation capacity and through lessons learned as a result of ongoing engagement with members of the local CES Chapter and its stakeholder community.

Environmental Scan
• Organizational cultures that are learning oriented and encourage staff participation, engagement and reflection in evaluation
• Organizations with supportive senior managers, or exemplary leaders, and knowledgeable, competent evaluation staff

Forum presenters and participants
• Small pockets of best practice to be shared
• A positive shift from quantitative surveys towards greater openness to different methods and ways of demonstrating rigour, including qualitative methods and contextual considerations
• More funders requiring evaluation
• Evaluation being incorporated into more continuing education management courses
• A strong federal framework of evaluation and the Federal Treasury Board’s Centre for Evaluation Excellence, which can guide growth provincially
• A common understanding of terms and concepts even though definitions of evaluation vary
• An increase in internal evaluators with expertise at advanced levels

Weaknesses: What should be addressed?

Environmental Scan
• Weak integration of evaluation into organizational systems and processes
• A low level of maturity of the evaluation culture and social norms related to evaluation
• Inequity in capacity and resources between and among some organizations, organizational units or portfolios
• Difficulty establishing evaluation-related collaborations, internally and externally
• Undefined or poorly defined evaluation objectives and priorities and poor project planning
• Separation of senior managers or decision-makers from evaluation activities

Forum presenters and participants
• Lack of data, lack of access to data, and lack of expertise to use existing data
• Lack of emphasis on evaluation in undergraduate programs
• Lack of evaluation training in management programs
• Weak relationships. “We, as a profession, don’t know who we are. People don’t know who we are either.”
• Challenges in accessing professional development and networking opportunities outside of the major urban areas
• Limited intermediate and advanced professional learning options

Data without context is not evidence. Evaluation.
Threats: What puts Alberta’s evaluation capacity at risk?

Environmental scan
• Ability to recognize or acquire new, additional resources, such as staff, training, infrastructure and funding
• Limited time for evaluation with “staff working off the sides of their desks”
• Decentralized management and a lack of common priorities
• Volatility in priorities based on political agendas versus evidence
• Ability to successfully introduce change in organizations with engrained values, norms and behaviours

Forum participants
• Fear of evaluation: the fear that negative results of evaluations will be demoralizing and result in the loss of resources

Opportunities?


“One of the concerns we heard is that funders often request specific evaluations for accountability, but these may not align with the agency’s values, needs and programs. As a result, sometimes the evaluation outcomes become uninformative; they are not actually used, and can lead to negative associations related to evaluation.”

– Jason Daniels, Director, Evaluation & Research Services, Faculty of Extension, University of Alberta

“Advocacy and the representation of our profession are still the weakest link in our equation.”

– Benoît Gauthier, CES President

UNDERSTANDING PROCESS

Kelly Tyler is chair of the 250-strong network of evaluators within Government of Alberta ministries. Like Benoît Gauthier, she sees evidence of a greater interest in evaluation, but a lack of interest, or perhaps a lack of understanding of the process.

“Within the government of Alberta, we don’t have a lot of people who have evaluator as their title,” says Tyler. “People do it off the side of their desk. They get one-off projects, but very few ministries have an evaluation team or people dedicated to doing evaluation at any level, strategic or program. We’re starting to see an interest there.”

Tyler says the current hot topic is analytics, although the term may mean something different to those using it, she says. The request is along the lines of, “we would like access to information at our finger tips to inform policy making, decision making, and program development.’ That’s being talked about at our federal, provincial, territorial tables,” says Tyler. “That’s a big focus.”

“All this we take as a good sign,” she says. “Anything that gets evaluation out there, that sparks an interest and starts the conversation, leads us to be able to educate outwards and upwards.”
A NETWORK OF NETWORKS

Throughout the forum, the need to boost knowledge sharing, build collaborations, and increase awareness of the power of evaluation was identified. Fortunately, a rich cluster of networking opportunities is available in Alberta. Six networks presented on their history, purpose and resources.

Alberta Centre for Child, Family, Community Research (ACCFCR)

• Established as a not-for-profit corporation in 2003 as a partnership between Alberta’s universities, the community and the Government of Alberta.

• Responsible for gathering, generating and mobilizing evidence to inform social policy and practice.

• Manages the Child and Youth Data Lab: Alberta is the first jurisdiction in the world to establish a data lab exclusively dedicated to understanding the cross-sector experiences and policies needed to optimize the well-being and future potential of children and youth. The lab analyzes linked administrative data that comes from a number of government ministries.

“Maybe we need a framework or something that guides how our networks practice in Alberta, how we connect, how we can share resources.”

– Renée Martin, AHS, Alberta Evaluation Network
How to connect
• Social media and e-newsletter links available on the website: http://www.research4children.com
• Events page on the website highlights learning opportunities
• Tara Hanson, Executive Director, Business and Partnership Strategies, is always looking for talent, and extends an invitation to anyone interested in discussing her current work developing an evaluation, quality assurance framework
  Email: thanson@research4children.com

LEARN ABOUT THE CENTRE
https://vimeo.com/87490406

Alberta Health Services (AHS) Alberta Evaluation Network
• Started in 2010 to connect evaluators across AHS and build capacity
• Membership is open to practitioners outside of AHS
• Holds meetings twice a month
• Offers an email distribution list to share resources
• Offers a membership contact list to help members connect outside of meetings
• Offers a bi-monthly learning series

How to connect
Contact Renée Martin
Email: Renee.Martin3@albertahealthservices.ca

Canadian Evaluation Society (CES)
“The national organization is always only as good as the strengths of its chapters. And the strength of each chapter is only as good as the support and guidance in direction that can come from the national organization.” — CES Executive Director Rebecca Mellett
• CES is the longest-established professional evaluation association and organizational leader in evaluation nationally and internationally since 1980; today there are 222 Voluntary Organizations for Professional Evaluation around the world as part of the International Organization for Cooperation in Evaluation
• CES is the first national evaluation association to develop a professional designation. The Credentialed Evaluator (CE) designation is now setting a standard for other countries exploring professionalization
• CES has 11 Chapters across Canada and provides member benefits that include representation, professional development, networking opportunities, and mentoring, and access to the Canadian Journal of Program Evaluation
• The Essential Skills Series (ESS) and other training have introduced thousands of people to evaluation and supported their growth as evaluators
• The annual conference is the key opportunity for Canadian evaluators to pause, think, learn, share, and network
• CES is about to launch a new mentorship initiative
• The Alberta & NWT CES Chapter is 228 members strong and offers a range of local chapter events

How to connect
Visit the website: http://www.evaluationcanada.ca
Become a member:
http://www.evaluationcanada.ca/why-become-member
Email: secretariate@evaluationcanada.ca
Evaluation Capacity Network, University of Alberta

- Designed with 20 University of Alberta and community partners and supported by a Social Sciences and Humanities Research Council (SSHRC) Partnership Development Grant
- The goals include:
  - Building understanding of the evaluation needs (capacity gaps and desires) across the province by conducting an inter-sectorial needs assessment, including a survey, and community forums
  - Developing educational and resource opportunities, including the opportunity for university students to participate in real world evaluations
  - Ensuring ongoing dialogue between the university and the community, and internally between the many faculties and departments within the university, to support meaningful evaluation practices
  - Developing opportunities for a national collaboration in partnership with Brad Cousins at the University of Ottawa, a national leader in evaluation capacity research

How to connect
Website: http://www.cup.ualberta.ca/projects-initiatives/ecme/current-project-list/ecn-overview
Contact Rebecca Gokiert
Email: rgokiert@ualberta.ca
Contact Bethan Kingsley
Email: bkingsle@ualberta.ca, or ecninfo@ualberta.ca

Government of Alberta, Evaluation and Assessment Network

- This voluntary community of practice of more than 250 members in government ministries was established to promote and support evaluation and assessment activities through knowledge transfer
- The network offers training opportunities

How to connect
Contact Kelly Tyler
Email: Kelly.tyler@gov.ab.ca

The future is going to happen anyway. Do you want a say in it?
AN ILLUSTRATIVE EXAMPLE

A complex, system-level evaluation and its value for informing decision makers.

Presented by Tara Hanson, Executive Director, Business and Partnership Strategies, Alberta Centre for Child, Family, and Community Research

Tara Hanson is part of a unique university, government, and community collaboration, the Alberta Centre for Child, Family and Community Research, which links data, and supports research “to look at life experiences of children and youth in order to inform policies and practice decisions.”

Hanson says her own organization is intent on building capacity and growing expertise, and did so in a big way with the strategic evaluations they’ve done for the Government of Alberta’s 10-year Strategy on Fetal Alcohol Syndrome Disorder.

The work involved nine partnering government ministries, 12 community-based service provider networks, and 16 evaluation sub projects, undertaken with the recruitment of academics, and evaluators including 14 graduate and post-doctoral students.

The result of the evaluation is that government has implemented six of the seven recommendations, but the work doesn’t end there.

“We supported some after evaluation work, to operationalize a realignment of the strategic plan… redefining some goals and creating some more measurable outcomes, developing key performance indicators, aligning the plan with results-based budgeting, and developing future evaluation frameworks for the evaluations that would follow in Year 7 and Year 10,” says Hanson.

The key challenge for the evaluation was data,” says Hanson. “Lack of data, lack of standardized data collection instruments, and even a lack of user databases to enter client information. So we had to use a lot of proxy measures when we conducted the evaluation.”

But the project taught them a lot about system-level evaluations.

“First, you must be very comfortable with ambiguity, because system level evaluations are not linear at all. They don’t come with a handbook. There is not a lot of published research on how to manage one. They take a lot of coordination, a lot of collaboration. It’s very relational work. You have to work with a team with diverse skill sets,” she says.

They also learned the value of stakeholder engagement. “And that’s engagement, not just at the top line ministry level, but engagement right down to the front line service providers,” says Hanson. “That communication has to happen consistently,” she says. “I can’t emphasize enough, the importance of contextual knowledge and looking at the entire social ecosystem that surrounds a program or strategy.”
Inclusion of stakeholders in the interpretation of data and in developing recommendations is equally important. “You have to work with your stakeholders in order to interpret the data and understand what it means in context,” she says. “And when the evaluation is completed, it’s not very practical to give government 200 recommendations on what they should do to improve their strategic plan. But if you work very closely with all the stakeholders, you can come up with seven recommendations that are actionable and sensible.” Hanson is currently developing an evaluation, quality assurance framework. “I would like to be very inclusive and invite anyone who is interested in what a quality evaluation is and developing criteria to measure successful evaluations.”

LEARN MORE


http://fasd.alberta.ca/documents/2-Year_5_Evaluation_of_the_FASD_10-Year_Strategic_Plan_WEB.pdf
CHARTING THE FUTURE OF THE “GLOCAL” ENTERPRISE

The forum and environmental scan were intended to inform planning for the CES Alberta & NWT Chapter’s next steps in advocacy by building understanding of Alberta’s current state of evaluation. Forum participants handily demonstrated enough vision, energy and passion to fuel a bright future for the practice of evaluation in Alberta, Canada and beyond.

A glimpse of that future shows greater understanding of our evaluation capacity, greater professionalism, and greater appreciation of the value evaluation brings.

1. Greater understanding of our evaluation capacity
   Building on the preliminary and Phase I study of the users of evaluation conducted by Crystal Corrigan, next steps for the Evaluation Capacity Environmental Scan Project include:
   • Phase 2 – looking at those who conduct evaluations and subject matter experts
   • Phase 3 – looking at evaluation networks and enabling environments
   • Phase 4 – conducting an overall gap analysis and synthesis of results

2. Greater professionalism
   “In some organizations there was an indication of under qualified individuals in evaluations positions, where organizational evaluation requirements may exceed their skills. We don’t want to hear that.”
   — Crystal Corrigan

   Strengthening the profession means strengthening the professionals. And forum participants called for a future with burgeoning opportunities for growth.

   “CES has gone through the process of defining competencies and standards. That’s brand new in the world. We are pioneering and in fact other countries are starting to look to Canada for guidance even though we are still new on our own journey…

   “…Maybe in 10 years we can look back and see that we can match, and maybe even surpass, those planners after all.”

   PROFESSIONAL DEVELOPMENT
   “We’ve heard a lot about the need for intermediate and advanced learning opportunities,” says Scott Christian, who is working on doing just that as director of professional development for CES Alberta & NWT.

   Christian also recognized the need to reach evaluators outside the major urban centres, while Renée Martin and the AHS Alberta Evaluation Network are looking for ways to expand access to professional development opportunities, including web-based approaches.

   Respondents to the environmental scan also saw the need for more specialized expertise in specific areas, such as economic analyses.

   COMMUNITIES OF PRACTICE
   A number of forum participants spoke of the need for communities of practice, the formation of informal or formal groups committed to learning from each other and solving problems together. Rebecca Mellett envisioned CES creating spaces for evaluators to get together to learn and share in an ongoing, practical way.

   CREDENTIALING
   Rebecca Mellett, CES executive director, sees professional planners as an example to learn from as evaluators increase their recognition as professionals. “No planner would pursue their career without getting their credentials. The PMP is a standard entry point for professional project managers and now they have another level. They actually have licensing.
Crystal Corrigan described the need for
- Championing of evaluation cultures within and between organizations
- Collaboration and creation of communities of practice within and across sectors
- Focused efforts to increase awareness of evaluation activity and its value in addressing barriers to enhancing evaluation capacity

MENTORING
While informal mentoring will increase as networks and communities of practice grow, CES is planning to introduce a formal mentorship initiative. “They will match mentors and mentees, or protégés, that are seeking a one-on-one structured relationships,” says Rebecca Mellett. “It’s a way to bridge people across sectors, different parts of Canada, or even internationally.”

3. Greater awareness and understanding
“I spoke with some very passionate interviewees who felt that the value [of evaluation] wasn’t understood in their organization,” says Crystal Corrigan. “Once we get that understanding, we’ll be on our way to continuing momentum.”

The CES strategic plan for 2015 to 2018, currently being finalized, will include strategies for increasing discussions with other professionals, promoting the value of credentials with employers and purchasers of service, and advocating for the value of evaluation and its use.

“This includes agreeing on the elevator talk and definition of evaluation and on the value proposition evaluation offers to organizations,” says Benoît Gauthier. “We will then take every opportunity to spread our gospel shamelessly.”

In the meantime, Rebecca Mellett offered a short hand for the value proposition: “Evaluation answers the question, ‘what works, for whom, and why?’”

Next steps for action
- Continue to build the advocacy strategy for Alberta, including creation of a “post card” advocacy campaign
- Engage the community in implementing the advocacy strategy
- Initiate subsequent phases of the environmental scan of the state of evaluation in Alberta
- Contribute to informing professional development opportunities, especially at the intermediate and advanced levels
- Contribute to the 2015-2018 Canadian Evaluation Society Strategic Plan

Learning about how to use social media in creating an evaluation capacity network #Eval
## REPORT APPENDIX

### THE NAKED TRUTH: THE STATE OF EVALUATION IN ALBERTA

April 10, 2015  
Delta Edmonton Centre Suite Hotel  
Edmonton, Alberta

#### Program Agenda

<table>
<thead>
<tr>
<th>TIME</th>
<th>WHAT</th>
<th>WHO</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-9:00</td>
<td>Event Registration &amp; Continental Breakfast</td>
<td>Canadian Evaluation Society (CES) Alberta &amp; Northwest Territories Chapter and Alberta Innovates—Health Solutions (AIHS) Representatives</td>
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<tr>
<td>9:00-9:15</td>
<td>Welcome Address</td>
<td>Kathryn Graham (AIHS, and CES AB/ NWT Chapter Advocate) and Judith Krajnak (CES AB/ NWT Chapter, Director-at-Large), Master of Ceremonies (MC)</td>
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<tr>
<td>9:15-9:45</td>
<td>Participant Introductions &amp; Networking Ice Breaker</td>
<td>Facilitator: Dorothy Pinto (CES AB/ NWT Chapter, Director-at-Large)</td>
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<td>9:45-10:15</td>
<td>State of Evaluation: Phase 1 Results Presentation</td>
<td>Crystal Corrigan (AIHS)</td>
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<td>10:15-10:45</td>
<td>Networking Break</td>
<td>All</td>
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<tr>
<td>10:45-11:45</td>
<td>State of Evaluation Continued: Reflection &amp; Opportunities for Action</td>
<td>Facilitator: Cheryl Poth, assisted by Kathryn Graham and Gail Barrington</td>
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<tr>
<td>11:45-12:45</td>
<td>Lunch</td>
<td>All</td>
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</table>
| 12:45-1:45    | Panel: Current Opportunities for evaluation in Alberta | Moderator: Judith Krajnak  
Virtual Address: Benoît Gauthier, CE President of CES National  
Panelists:  
- Scott Christian (CES AB/ NWT Chapter, Professional Development Coordinator)  
- Kelly Tyler (Government of Alberta, Evaluation and Assessment Network (EAN))  
- Renée Martin (Alberta Health Services, Alberta Evaluation Network)  
- Tara Hanson (Alberta Centre for Child, Family and Community Research (ACFCSR))  
- Jason Daniels (Evaluation Capacity Network) |
| 1:45-2:00     | Refreshment Break                 | All                                                                  |
| 2:00-2:45     | Improving our Advocacy: Communicating the Value of Evaluation | Presenter: Gail Barrington, assisted by Kathryn Graham |
| 2:45-3:00     | Wrap Up & Next Steps              | Closing: Rebecca Mellett (CES Executive Director) and Kathryn Graham |
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